

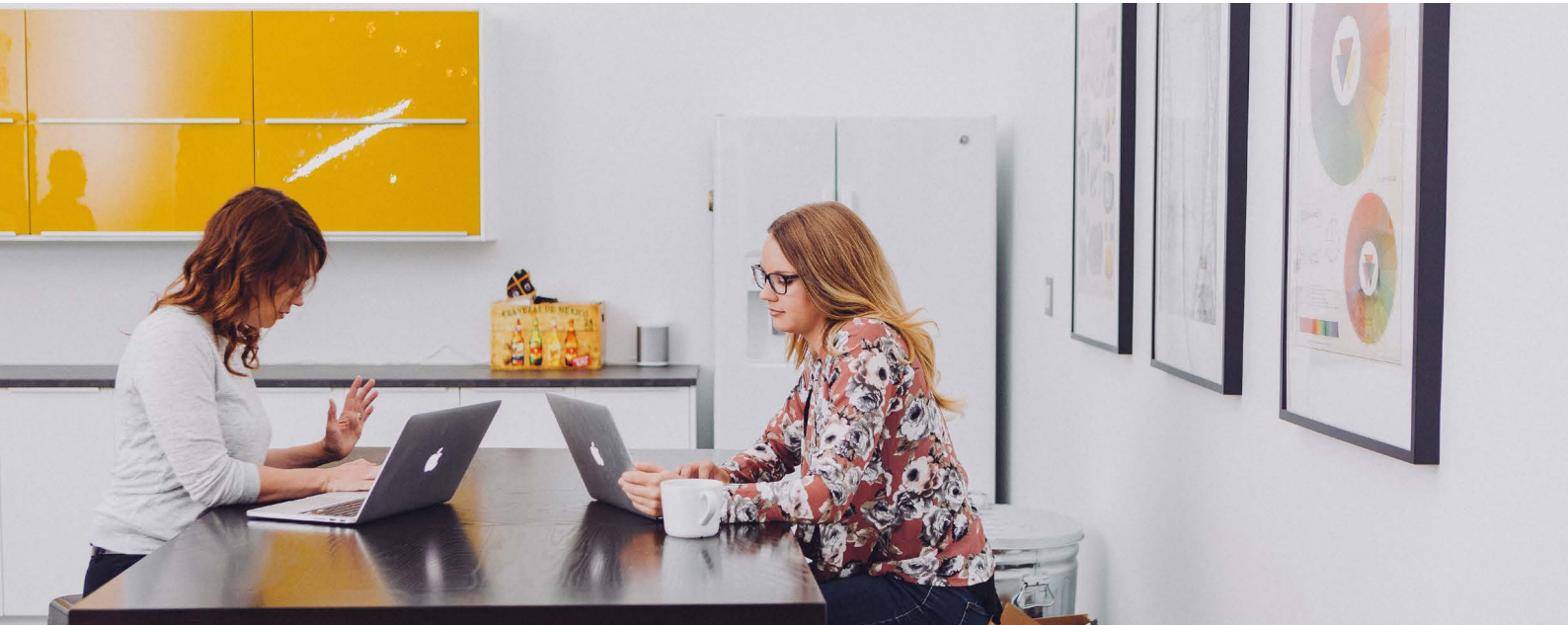


CASE STUDY:

Hedges Law Look To The Future

How a 225 year old law firm modernised their practice during COVID-19 lockdown





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Hedges Law is a very modern 225-year-old firm that has embraced the benefits of cloud-based technology to enable their lawyers and staff to work flexibly from anywhere, while providing the best service and advice to their clients.

Here they speak about their experience implementing Actionstep, an end-to-end cloud-based legal practice management system via a fully virtual onboarding processes during the COVID-19 lockdown. They discuss working with law firm consulting group Cloudify Legal, their technology challenges and goals and the criteria they used to choose Actionstep as their practice management software.....

What Initially Attracted You To Actionstep?

It's a true cloud solution. Our Director of Central Services brought a wealth of experience of using Saas (Software as a Service) in other businesses and sectors – we wanted to bring the latest technology to Hedges Law. Actionstep's workflow 'secret sauce' is what really sold it to us. As we embark on an exciting journey of growth, the culture and background to Actionstep combined with Cloudify Legal, really resonated with us and aligned with our values and culture.

What System Were You Using?

Hedges Law used a case management system that was hosted through an overly complex combination of a virtual private network, the software itself and Microsoft Exchange. Despite being promoted as a cloud system, it required a whole IT infrastructure that was costly to maintain, difficult to customise/update and with so many moving parts resulted in reliability issues.

What Challenges Were You Having?

Reliability, the cost of system updates, the complexity of staff onboarding and poor reporting functionality were key challenges. Staff were growing frustrated with the time lost as a result of reliability issues, so it was a double-edged sword – expensive in both wasted cash and time.

The system had customisation options but they required development just to make basic amendments. Each update would require a cost vs benefit analysis and due to the high cost, many of the features and things the system could have done never happened.

For new staff that joined we had to engage multiple businesses to set up licences, infrastructure, etc. This meant a long lead time between planning for a staff member to join and them being set up, and able to do work. There was poor financial reporting out of the box. We spent significant time and money customising financial reporting to get meaningful data for us to make management decisions.

However, each time we added a new staff member or matter type, it required additional expense for the financial reporting to be accurate. As we all know, a 99% accurate report is just as bad as a 50% accurate report. It needs to be 100% accurate. This meant we could not easily see the financial health of the business or report to all our stakeholders.

Describe The Procurement Process You Took

Hedges undertook a search for a Cloud based practice management systems. We looked at online reviews and contacted actual customers of the software provider. Hedges just took a number of weeks to make a decision that Actionstep was right for the business.

The key decision-making criteria was:

- SaaS technology
- Fully integrated accounting system
- Cost effective
- Rapid workflow customisation
- API integrations with other leading cloud services
- Full G Suite integration

We undertook a comprehensive feature analysis against our current provider and found significant functional benefits at a lower operational cost. With the SaaS offering providing greater reliability, scalability and security at a lower cost, it made the decision very simple.

How Did The Migration Project Start And How Long Did It Take?

First of all, Hedges Law invested in the Cloudify Legal workflows in order to implement Actionstep quickly and apply best practice for the property, family, private client, litigation and compliance. The timeline from project kick-off to starting to use our Actionstep system was 3 months. But it doesn't stop there, Cloudify Legal continue to support us to further our understanding of how Actionstep can help our business. It doesn't need a qualified developer, it just requires someone with some IT knowledge.

How Did You Implement The System Virtually?

As we were getting ready to start our transition to Actionstep, the UK Government announced COVID-19 lockdown measures. We had a lot of concerns about continuing the project at such a time of upheaval. Our team were asking "Why not wait until later? How will we cope with the natural disruption from a change of system alongside that disruption? Are we biting off more than we can chew?"

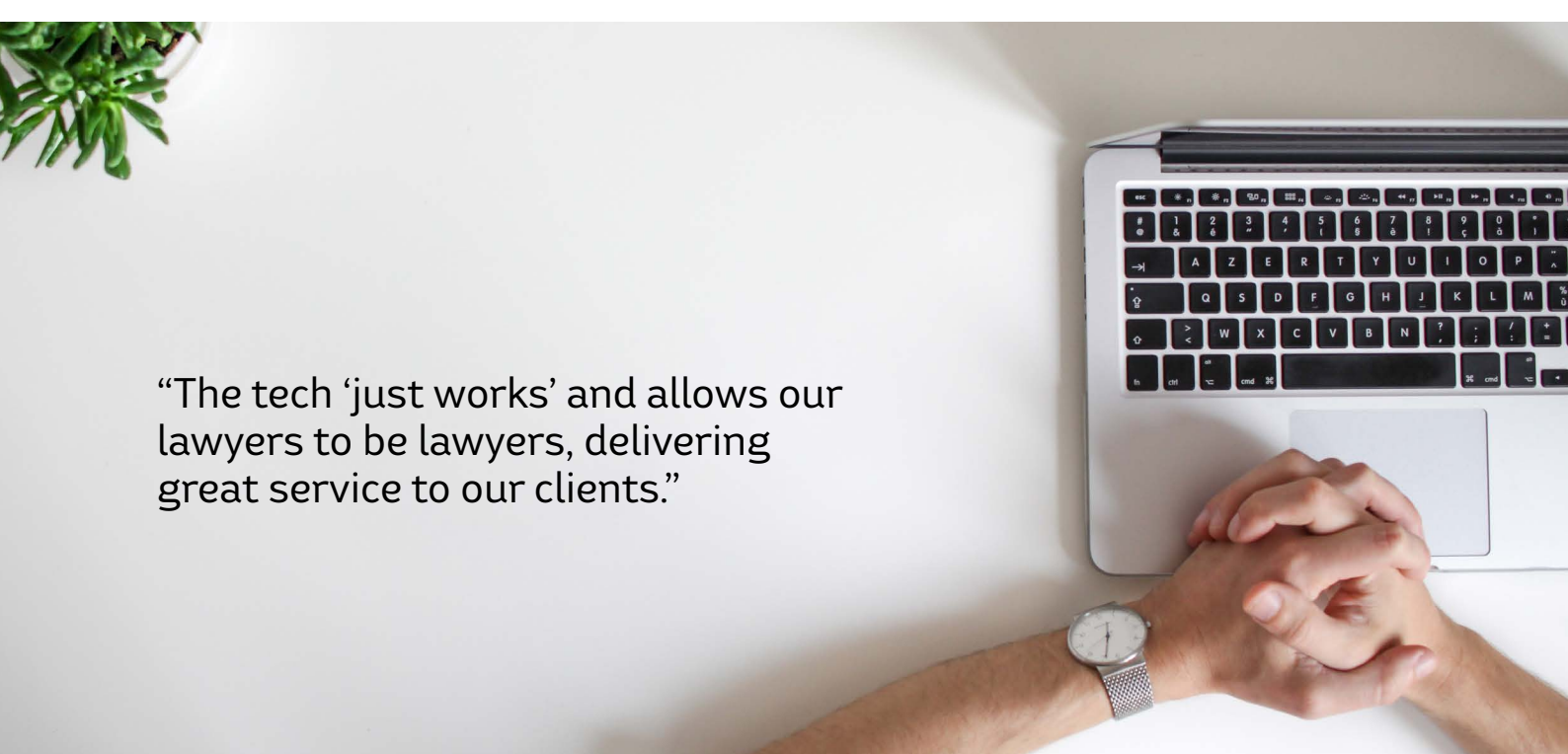
We asked Cloudify Legal and Actionstep directly for their thoughts. It was clear they're not just sales people, they really believe in helping their clients and we trusted them to provide us with their honest opinions. Their answer was that we should continue with the implementation on a virtual basis so that we had the tools we needed for lockdown. They put our minds at ease and delivered an exemplary implementation and migration service. Actionstep was built for the virtual world!

Users were successfully trained online using Google Meet, a core feature of G Suite and the Google Cloud Platform.

How Was Your Data Migrated?

After many discussions on what data the firm should transfer from the old to new system, we decided to migrate the whole lot! The data had become a mess in the old system and any cleansing exercise would have put the project back months. And as a law firm, we obviously have obligations to keep the data for a certain time period so we couldn't risk not having it. Keeping the old system alongside Actionstep would mean more than doubling operational costs.

Cloudify Legal provided cost effective data migration service over a weekend of 35,000+ matters. Not sure they got any sleep! We really liked their weekend approach as it meant staff could finish on Friday on the old system and start on Monday on the new system. In with the new and out with the old. It was also a new financial year. A new start for the business. What an exciting start to the financial year it has been!



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What Benefits Has Actionstep Brought To The Business?

Payback on the implementation costs was measured in weeks.

Actionstep has allowed Hedges Law to move away from the 'break and fix' model (reactive to tech issues) and allowed investment of time and money into delivering significant operational efficiencies. Hedges Law productivity continues to soar.

With tight integration with GSuite, Actionstep has allowed Hedges to significantly reduce operational costs whilst dramatically increasing operational flexibility for our people. With bank grade security we have dramatically increased our data security without the technical overhead and significant operational costs that are forced upon businesses by using traditional behind the firewall (or VPN) technology.

The tech 'just works' and allows our lawyers to be lawyers, delivering great service to our clients.

New staff members are set up in minutes and fully operational in hours due to a very intuitive user interface. Actionstep forms the cornerstone of Hedges strategy of providing legal services anywhere, anytime, any device. As we grow as a business we can't have delays, disruption or downtime from the technology we use.

What Has The Feedback Been From The Staff?

They love the interface and intuitive nature of the system. The buttons are where you'd expect them to be and eloquently guide the user through what they want to achieve. They save time on every single activity. Look after the seconds and the hours look after themselves ...

In addition, the workflow automation and document templates have delivered significant operational efficiencies allowing us to improve client care, reduce risk and most of all keep the staff happy. Search is also excellent. Gone are the days of endless searching through emails, notes, etc. just to find that one piece of information (e.g. completion date). The document or information is available at a click of a button to all users with permission.

What Does The Future Look Like For Hedges Law?

Established in 1789, some twenty-three years before Charles Dickens was born, Hedges Law has endured many Kings, Queens, Prime Ministers, world wars and even a few pandemics! Today, we consider ourselves to be leaders in the use of true cloud-based technology to support our goal of delivering high-end legal services to our clients.

We are continuously working on how we can utilise more features in Actionstep. Since the launch we have rolled out a lot of new features including a bespoke risk assessment feature, an SDLT calculator and a customised file review question set. We are also in the process of building an automated Wills template that will save hours of work per Will. Actionstep really can be used to run the whole business!



About Hedges Law

www.hedgeslaw.co.uk

Hedges Law is a 225 year old law firm, with a very modern approach. We call it, Advice for Life. At Hedges, we work alongside you, in a collaborative professional relationship: we're not the sort of people to tell you how important and clever we all are: for us it just doesn't work like that. However big or small your legal issue, we are committed to exceeding your expectations. It's what we do: advice for life. Our core practice areas are Family Law, Private Client, Property Law and Dispute Resolution.



With you every step.

About Actionstep

www.actionstep.com

Actionstep is a flexible, easy to use software platform for ambitious legal service providers to manage and grow their practice.

Built in the cloud, with workflow at its heart, Actionstep transforms law firm productivity at every step. Combining CRM, Matter Management, Document Assembly & Storage, Time & Billing, Trust & Office Accounting, Reporting and much more in one system, Actionstep gives you everything you need to run your firm and provides full visibility across the health of your practice.

With unlimited scope to scale & evolve, Actionstep's legal practice management software will take you every step of your journey as a law firm or law centre.



About Cloudify Legal

<https://www.cloudify.legal/>

After 80+ successful Actionstep implementations, the team at Cloudify Legal have the experience to migrate law firms to Actionstep and ensure the firm thrives. They help their clients streamline workflows to suit their clients and business needs. Cloudify Legal support and train the firm's people to use the technology effectively so they have more time to surprise and delight their client.